

AGENDA ITEM: Telecommunications Infrastructure**GENERAL OVERALL PROGRAM UPDATES:***Telecommunication Infrastructure Grants*

In April 2000 the Board authorized the expenditure of up to \$2,262,000 to support project grants for regional telecommunications infrastructure leading to the establishment of regional library catalog access, electronic interlibrary loan, and electronic patron authentication.

Summaries of objectives and the first quarter reports are presented below. Second quarterly reports for each grant were in progress at the time of this report.

Cascade Pacific *Connecting to the Millennium, Phase II*

Acquire a regional server to manage traffic between libraries and to implement a regional interlibrary loan system.

The automation vendor for the proposed interlibrary loan system gave a presentation about the product to a meeting of all participants. The system was demonstrated and implementation details were discussed. Data about each participant's system is being gathered in preparation for the implementation phase.

Golden Gateway *Regional Resource Sharing Initiative*

Conduct an evaluation study and propose a resource-sharing model to serve Golden Gateway Library Network members. Evaluate the three disparate CLSA system servers (MOBAC, NBCLS, & SVLS/PLS/BALIS).

Three possible outcomes/recommendations for accomplishing resource sharing within the region are under discussion:

1. Keep 1, 2, or all 3 systems and work with respective vendors to create on interoperating system
2. Choose one of the existing systems as viable for use throughout the region
3. Choose a new product/vendor through a formal RFP process

The consultant has recommended an RFI process for gaining more information on the existing Linked Systems software and on the marketplace. The RFI will be distributed in January to all automation system vendors used by member libraries in the region and to the vendors supporting resource-sharing software.

A user satisfaction survey is to be developed which will provide valuable information on how successful the public finds each of the Linked Systems. This data will be included in the final recommendation of the Advisory Group.

Sierra Valley

SVLN: Staying Connected

Expand the current Systems' technology plan to incorporate libraries of all types within the planning region and develop minimum standards for connectivity. Support the ongoing costs of the servers, improvements of existing Z39.50 connections and server performance, and the development of an automated ILL system. An earlier grant is targeting school and special libraries in the region to gather technology/automation information.

Initial activity was focused on the LSTA "Regional Electronic Connectivity" grant which laid the groundwork for this project. It identified the need for a ILL Request Management System to enhance the current regional catalogs of MVLS and 49-99/CAL. A contract was signed in December for a software consultant for this item. Work will begin in January, 2001. Recruitment for a consultant with technical expertise to assist with day to day issues was completed. Work also continued in a related SVLN project called "Technology Inventory" which will survey schools and special libraries in the SVLN region as to their current state of library technology.

Arroyo Seco

Technology Connection Project III

Continue an LSTA project to install a gateway and interlibrary loan system in the Metropolitan Cooperative Library System, Santiago Library System, and South State Cooperative Library System. The ten additional libraries in this project will include at least two libraries from the South State Cooperative Library System, and three non-public libraries from the region.

A consultant assigned to the project to ameliorate the loss of technical staff has worked with the vendor to reduce the technical complexity of the project. The interlibrary loan component of the system is complete; some delays have been experienced in implementing the remote patron authentication capability. Workstations for the resource sharing system have been deployed at participating libraries. Live and online training sessions were held for participating system administrators and interlibrary loan staff.

Tierra Del Sol

Tierra Libraries Connect

Fund consultant study to develop a detailed plan to implement regional access and resource sharing. Start implementation of consultant's recommendations.

Consultant met with region representatives in September and December 2000 to develop a plan and guide project activities. Over 50 potential participants in the region have completed a technology survey. The next meeting of the advisory

group for the project will be on January 29th, 2000. Results of the survey will be used to begin a draft of a RFP.

Heartland ***Heartland Resource Sharing System***

Expand the gateway and interlibrary loan system currently operated by the San Joaquin Valley Library System (SJVLS) on behalf of its member public libraries to include other types of libraries in the region.

Technical information that is required for this grant project is being gathered as needed. Information on library automation systems, networks, and firewalls on the grant participants was collected. The servers and software were ordered in mid-September 2000 when the contract was complete and are being staged at the vendor. The overall project should still be completed before the end of the grant period.

The WebPAC is set up and installed and initial testing of Z39.50 files for the participating libraries is complete. Meetings will be held with regional libraries starting in March.

Gold Coast ***Cat-a-Link Gold***

Implement a gateway server and electronic interlibrary loan system to support public access to library catalogs and materials. Public access via remote Internet browsers and patron-initiated interlibrary loan are part of the project design. This project also includes remote patron authentication.

An automation technician was hired on September 5th, 2000 to oversee the implementation of the project. Epixtech was selected as the vendor for the Cat-A-Link Gold project. URSA (Universal Resource Sharing Application) is the software being used as the base for the virtual union catalog and interlibrary loan system. A contract is currently being negotiated with Epixtech. The software being used to implement Cat-A-Link Gold was explained briefly in an informational seminar held for member libraries.

A number of the projects include technology surveys of region members. Reports from these surveys and evaluation of the impact of these grants on services to members of each region should provide baseline data for planning additional services required in the future. Staff will work with grant participants to incorporate additional planning information into the next quarterly reports.

Z39.50 Server Software Grants

Z39.50 is a protocol that allows for the simultaneous searching of one or more library online catalogs over the Internet, regardless of the proprietary software and hardware on each local computer system.

The purpose of funding the development of Z39.50 connectivity is to establish the infrastructure necessary to create a virtual statewide database representing the holdings of California libraries. Such a virtual database is an important component of a cluster of access services envisioned in the Library of California Act.

At its November 2000 meeting the Board directed its Chief Executive Officer to continue to offer a Z39.50 server software reimbursement. Funds for ten \$7,500 grants were allocated for LoC member libraries. Since the November 2000 Board meeting three grants have been awarded, one application is pending. \$45,000 in funding remains to grant six additional grants.

Staff will continue to promote grant availability through communications with the Regional Library Networks.

The National Information Standards Organization (NISO) Committee for the development of a US National Profile for Z39.50 held its second meeting in Washington D.C. in January. Staff, as member of the committee, attended and relayed information on the work of the group to the CALZIG electronic discussion list in California. Exhibit A is the web page for the committee. Staff encourages feedback from the LoC Board and California librarians on the proposals moving forward. Early drafts of specifications for public review are expected in March 2001. Exhibit A provides an overview of the committee and lists committee membership.

Telecommunications Infrastructure Standards

At the November 2000 LoC Board meeting the Board discussed concerns from a number of libraries about the criteria for the LoC telecommunications infrastructure. Included in those criteria was the stipulation that Regional Library Networks use the Z39.50 protocol as the access protocol for their telecommunications infrastructure programs. Staff continues to develop background materials, a review of the Z39.50 protocol and its role in Library of California and Library Services and Technology Act (LSTA) programs. A planned study by a consultant to assist in developing this background material, including discussions with those in the field concerned about the issue, was unable to be completed in time for this meeting. A full report will be made at the April 2001 LoC Board meeting.

Other programs of Interest to the Board

E-Rate Program

The California State Library is responsible for the approval of technology plans from each applicant public library. Year four applicants (July 1, 2001 – June 30, 2002) will need to have an updated technology plan approved if they participated in the first year of the E-rate program. Technology plans cover a three-year time period. Several

libraries have updated their plans, staff provides guidance to libraries to be sure plans are in accordance with the criteria for the program.

The Schools and Libraries Division (SLD) of the Universal Service Administrative Company (USAC) provides affordable access to telecommunications services for all eligible schools and libraries in the United States. The USAC is a not-for-profit corporation appointed by the Federal Communications Commission (FCC) to ensure that the benefits of telecommunications services reach students and communities across the country. Funded at up to \$2.25 billion annually, the Program provides discounts on telecommunications services, Internet access and internal connections

The California State Library webpage on the E-Rate program (www.library.ca.gov/html/libserh8.html) has been updated as new information about the program is made available. In response to the Child Internet Protection Act legislation (CIPA), information about new requirements from the Federal Communications Commission (FCC) was being monitored at the time of this report. The InFoPeople project will be providing training courses about selection and use of filtering products for libraries. Staff will disseminate new information as it becomes available from the SLD or other sources.

RELATED ISSUES TO COME BEFORE THE BOARD IN THE FUTURE:

1. Development of Regional Telecommunications programs.
2. Review of Z39.50 standard criteria for LoC Telecommunications Infrastructure.
3. Consideration of Z39.50 Server Software grants.

Relevant Committee: Support Services
Staff Liaison: Ira Bray